

RESOLUTION

BE IT RESOLVED BY THE JEFFERSON COUNTY COMMISSION that Administrative Order 93-1 is hereby amended as follows:

1. By deleting from paragraph 1(c) the following:

"All staff development for whatever purpose must be approved by the Commission either by official act of the full Commission or, if an emergency situation occurs, by obtaining the signatures of at least three Commissioners prior to staff development traveling."

and substituting therefor the following:

"All staff development for whatever purpose must be approved by official action of the Commission at a Regular Meeting."

2. By deleting from paragraph 1(e) the following:

"If an employee must travel at County expense and the Staff Development request is not included in the weekly Memorandum, the Staff Development Request Form may (1) be presented by the Commissioner as new business at the next Commission meeting or (2) the employee may obtain three Commissioners' signatures for approval to travel."

and substituting therefor the following:

"If an employee must travel at County expense and the Staff Development request is not included in the weekly Memorandum, the Staff Development Request Form may be presented by the Commissioner as new business at the next Commission meeting."

BE IT FURTHER RESOLVED BY THE JEFFERSON COUNTY COMMISSION that this Amendment to Administrative Order 93-1 shall be effective on the 12 day of December, 2006.

**APPROVED BY THE  
JEFFERSON COUNTY COMMISSION**  
DATE: 12-12-06  
MINUTE BOOK: 152  
PAGE(S): 412

ADMINISTRATIVE ORDER  
O F T H E  
JEFFERSON COUNTY COMMISSION  
93-1

PURSUANT to the authority vested in the Jefferson County Commission by the Code of Alabama, the following Administrative Order is hereby issued:

PURPOSE

To establish policies and procedures with respect to staff development and other out-of-county travel. Replaces Administrative Order Nos. 77-2, 84-1, 88-1, 91-1 and 91-2.

1. GENERAL POLICY

(a) All staff development shall result in a benefit to the County. Accordingly, only those persons who direct the activities of others, serve in a management function, whose professions require specific training or those persons identified by the affected department head and approved by the Commission shall be authorized to incur expenses for staff development. Training seminars attended shall be appropriate to the level of responsibility and job requirements.

(b) Each employee of Jefferson County who authorizes, directs or receives staff development or who reviews, certifies, or otherwise authorizes payments of reimbursement of staff development expenses is expected to exercise due care and to practice economy in all matters involving staff development costs. However, consistent with such care and economy, no officer or employee of Jefferson County shall be put to personal expense as a result of his performance of properly approved staff development.

(c) Staff development shall be on a planned basis, utilizing available funds in the County's annual budget. All staff development for whatever purpose must be approved by official action of the Commission at a regular meeting. Trips taken without Commission approval may result in the official/employee not receiving reimbursement from the County for their travel cost. Employees must contact the County's travel agent to make arrangements for all trips involving air travel. The employee must inform the agent of conference room rates and reduced airline rates, if applicable. Employees shall complete the form Travel Request, BMO-30 (rev 3-91) including: (1) purpose and duration of the trip; (2) estimated costs of travel, transportation, accommodations, meals, incidental expenses and registration form including fees; (3) attach any brochure/itinerary providing starting and ending dates and times. and a detailed listing of conference activities; (4) reasons for

multiple attendance, if applicable, and (5) the identification of all individuals requesting authority to attend at County expense. Employees that travel without submitting the Travel Request form will not receive reimbursement from the County for their staff development costs.

(d) Except as provided in paragraph 2 below, it shall be the policy of Jefferson County Commission that the minimum number of persons considered practical or necessary (whether County official or County employee) shall attend, at the expense of Jefferson County, any such meetings, annual associations and conventions, seminars, specialized training or other staff development. The County officials or County employees in attendance and performing such travel shall obtain the relevant information from such meeting and make it available to all other County officials and employees that need to know the information.

(e) The Budget Management Office will accumulate all staff development requests from all areas of the County and submit them in the form of a Staff Development Memorandum to the Commission at its next weekly Pre-Commission Meeting. Staff Development requests received by the Budget Management Office by noon of each Wednesday will appear as regular business on the next Commission agenda. If an employee must travel at County expense and the Staff Development request is not included in the weekly memorandum, the Staff Development Request Form may be presented by the Commissioner as new business at the next Commission meeting. The Staff Development Memorandum will be divided into three parts. The first part will list multiple staff development; the second part will list all single staff development requests; and the final part of the Memorandum will list all other travel to be authorized.

(f) The following types of staff development must be explained to the County Commission at a Pre-Commission Meeting in advance of the regular County Commission Meeting at which such staff development request would be approved:

- (1) Annual associations and conventions;
- (2) Seminars;
- (3) Specialized training; and
- (4) Other discretionary out-of-county travel.

For such explanation the Staff Development Memorandum shall include a written explanation from the department showing how the proposed staff development shall result in a benefit to the County, including how the purpose of the staff development is appropriate to the level of responsibility and job requirements of all persons who will attend.

## 2. MULTIPLE STAFF DEVELOPMENT AUTHORIZED

(a) Multiple staff development must be supported by a memo explaining the need for such staff development.

(b) For any staff development that involves costs but that does not involve overnight accommodations and/or common carrier transportation, the respective County Commissioners and their department heads shall recommend for authorization such multiple attendance which is in the best interests of the County.

(c) All other exceptions to the policy require prior specific approval of the Jefferson County Commission. Such approval shall be requested by completion of the multiple staff development block on the Staff Development Request form.

(d) To ensure that the County receives the best rates possible and at minimum cost, requests for multiple staff development must be submitted for approval at the same time and paid or finalized at the same time.

## 3. TYPES OF STAFF DEVELOPMENT

(a) Staff Development (Object 53501)

- (1) Annual associations and conventions: Activities resulting from professional associations designed to foster the development of its members and other professionals.
- (2) Seminars: Activities designed to foster professional development through interaction and discussion of specific problems relevant to the participants.
- (3) Specialized Training: Specific training activities designed to increase job effectiveness.

(b) Each Appointing Authority may authorize without any forms or receiving additional Commission approval an employee request for staff development costing less than \$100.00 where the following conditions are observed:

- (1) The employee incurs no other costs except salary and fuel;
- (2) The County makes no advance;
- (3) The employee obtains a valid receipt for the course;
- (4) The Appointing Authority signs the receipt; and

- (5) The employee presents the signed receipt at the Treasurer's Office for petty cash reimbursement.

(c) Requests for staff development that involve no County expenditures other than salary and fuel and is one of three types listed above may be authorized by each Appointing Authority without completing any forms or receiving additional Commission approval.

#### 4. OTHER TYPES OF STAFF TRAVEL

(a) Other Travel (Object 53503)

- (1) Site visitation;
- (2) Tax audits;
- (3) Grant-in-aid briefings; and
- (4) Court or litigation requirements.

(b) Requests for authorization for these types of travel shall be made on the same request form, and listed on the Staff Development Memorandum. There is no requirement for written justification except when there is multiple staff travel.

(c) Each Appointing Authority may authorize without any forms or receiving additional Commission approval an employee request for other travel costing less than \$100.00 where the following conditions are observed:

- (1) The employee incurs no other costs except salary and fuel;
- (2) The County makes no advance;
- (3) The employee obtains a valid receipt for the session;
- (4) The Appointing Authority signs the receipt; and
- (5) The employee presents the signed receipt at the Treasurer's Office for petty cash reimbursement.

(d) Requests for travel outside of the County that involve no County expenditures other than salary and fuel and is one of the four types listed above may be authorized by each Appointing Authority without completing any forms or receiving additional Commission approval.

## 5. REIMBURSEMENT POLICY

(a) Advances to employees for approved travel may be issued by the Finance Department no sooner than thirty (30) days in advance of the actual travel date(s). In instances where registration fees and travel arrangements are made in excess of 30 days prior to the travel date, the Finance Department is authorized to make direct payments to applicable vendors for registration fees, hotel reservations, etc. Upon request, the Finance Department may reimburse employees the cost of tickets for common carrier travel to an approved staff development course prior to the date of travel. Where the ticket was purchased but was unused, and its residual value remains in the name of the employee, the Commission will take action on each individual circumstance on a case by case basis based on the facts of the situation.

(b) Transportation: The method of travel selected shall result in the greatest economies of costs and time. The use of tourist, excursion and discount fares is encouraged in all cases. Transportation costs are reimbursable on an actual cost basis and include:

Receipt required:

1. Common carriers.
2. Rental car.
3. Ground transportation, to and from airport, required to conduct official business.
4. Parking and tolls (maximum amount \$50).
5. Personal auto mileage-odometer readings. Required: rate established by separate resolution; mileage and expenses in transit limited to tourist rate for trips in excess of 300 miles one-way.

Transportation for multiple travel will be authorized for County or personal autos based on the number of employees attending during the same time period and each auto will include up to three employees:

- 1 - 3 employees = 1 vehicle
- 4 - 6 employees = 2 vehicles
- 7 - 9 employees = 3 vehicles

Employees are required to obtain cost comparisons (flying versus driving) for trips in excess of 300 miles one-way. For trips of less than 300 miles one-way, the mode of travel shall be by vehicle unless specifically authorized by the Commission.

Where staff plan to use rental vehicles, there must be separate justification as to why other common ground transportation such as taxi service is inadequate for the anticipated need.

(c) Lodging: Lodging costs, including applicable taxes shall be reimbursed on an actual cost basis and must be supported by a receipt. Lodging does not include tips, movies, room service and cleaning bills. Telephone calls will be reimbursed for calls returned to Jefferson County for official business. No calls home or for personal reasons will be reimbursed by the County.

(d) Meals and Incidental Expenses: In some instances the actual expense of meals and other incidental items may exceed the per day allowance. In situations such as these, expenses shall be reimbursed on an actual cost basis and must be supported by receipts. The actual cost basis, if elected by the employee, shall be used for the entire trip. An employee cannot use the per diem basis for one quarter, switch to actual cost basis, and switch back to per diem basis. A per diem rate is established by a separate schedule which is updated and adopted by separate resolution to conform to Internal Revenue Service provisions for the cost of meals and incidental expense associated with official, overnight out-of-county travel. If the travel involves same day return to the County, no per diem will be paid. (For example, no per diem will be paid for an employee's trip to Montgomery for a meeting in which the employee returns the same day.) The per diem shall be allocated in quarter-day segments from midnight. Per diem will be calculated based on the latest possible registration time prior to the first session of the conference. (Normally, conferences have an afternoon registration the day before the conference and a registration the morning prior to the first session of the conference.) A maximum of two quarters of per diem will be allowed for travel to an event and a maximum of two quarters of per diem will be allowed for travel from an event.

(e) Registration fees: Registration fee forms for conferences attached to the travel request indicating dates for early registration, etc. will be paid directly to the conference sponsor. Registration fees not pre-paid by Finance shall be reimbursed on an actual cost basis and must be supported by a receipt or a copy of the registration form.

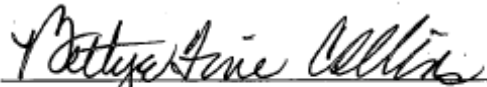
(f) Unusual expenses shall be accompanied by a written explanation as required by the Department Head and County Commission. Expenses determined by the County Commission (with a recommendation of the Department Head) to be unreasonable shall be disapproved.

(g) In some instances, it may be cheaper for an employee to leave or return on Saturday to take advantage of the cheaper airfares which require a Friday or Saturday night stay over. The department must document the cost savings including lodging and additional per diem costs and submit it with the request for travel.

(h) Within 30 days of an employee's return from travel, the employee must submit a final accounting of travel costs to the Finance Department. The total amount of

any employee travel costs not accounted for within thirty (30) days of return will be deducted from an employee's compensation. By the 25th day, the Finance Department will notify the employee and department head that the travel costs have not been accounted for and on the 30th day, the Finance Director is authorized to deduct the total amount of the staff travel costs from the employee's next paycheck.

ORDERED at the Jefferson County Courthouse, to be effective this 12 day of December, 2006.

  
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BETTYE FINE COLLINS, President  
Jefferson County Commission